

## Candidate Filings



Before adding and approving a Candidate Filing for an election, you must have successfully set up the contest for which the candidate is filing and have a Contact Record for the candidate that is viewable to the jurisdiction adding that candidate. See the [Contacts](#) chapter for more information.

### Add a Candidate Filing

1. Expand (+) the **Elections** node.
2. Expand (+) the election to which you wish to add a candidate filing.
3. Click the **Candidate Filings** node.
4. Click the **New Candidate Filing** Quick Task to open the **CandidateFiling – Add** window.

5. Click the **Address Book Icon**  to the right of the **Candidate** box to open the **Contact Search** window.

6. In the **Last name** box of the **Contact Search** window, type the candidate's last name.

7. In the **First Name** box of the Contact Search window, type the candidate's first name.

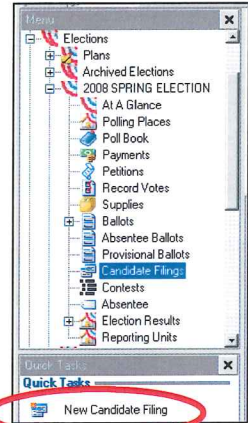
8. Click **Search**.

9. If the search results include the candidate's **Contact** record, double-click on that row in the data grid.



You can only use the **Contact Search** window to find a contact record that is "viewable" to your **Active Jurisdiction**. If the search results do not include the candidate's **Contact** record, close [x] the **Contact Search** window. You will need to create a new **Contact** record, or open the **Contact** record in its owning municipality and change the record to be viewable at the county or state level. See the [Contacts](#) chapter of this manual for more information on creating or editing **Contact** records.

10. In the **Contest** box, click on the contest in which the candidate is running.



Candidate:

**Contact Search**

Last Name: LAMBERTSON First Name: NAOMI Middle Name: Suffix: Search Options: ☐ Non-Person ☐ Include Retired Contact Records

Date of Birth: Soc Sec Num: Party:

House No: Street Name:


City: State: ZIP Code:

☐ Count Only

Drag a column header here to group by that column

Owner	Contact Type	Name	Address	Residential City
CITY OF MADIS		LAMBERTSON, NAOMI	738 LORILLARD CT 201	MADISON, WI

**Candidate Detail**

Candidate: LAMBERTSON, NAOMI 

Candidate Address: 738 LORILLARD CT 201 13251-044-1 MADISON, WI 53703 ☒

Election: Barb's November GE

Contest:

Party: Non-Partisan GAB ID# 191919

Ballot Position: 3 Local Cand No:

11. You will only change the **Party** if you are setting up a candidate for the September or November Election. The Candidate Filing record should now save the **Party** independently of what is listed in the **Contact** record.

12. The **GAB ID#** is used rarely , usually only for statewide candidates.

13. In the **Ballot Position** box, type a number corresponding to the candidate's position on the ballot for that contest, as determined by random draw.

14. If you use an identifying number for local candidates, you may choose to enter it in the **Local Cand No:** field.

15. Make sure the **Name on Ballot** reflects the name the candidate would like to appear on the ballot.

16. If you choose to track a candidate's filing details in SVRS, you will follow the optional steps below. You will enter data in the **Filing Checklist** and **Nomination Papers** sections of the **Candidate Filing** record, and may choose to print the **WI Nomination Paper Receipt**, the **WI Nomination Paper Sufficiency** form, or the **WI Nomination Paper Verification**. These steps are detailed in the next section.

17. If you do not choose to track candidate filings in SVRS, you only need to enter those candidates who will appear on the ballot. Make sure their **Status – Reason** is **Approved – Approved**.

18. **Save and Close.**



## (Optional) Track Candidate Filings Status in SVRS

As of September 2010, the GAB will be tracking Candidate Filing Status in SVRS, including all candidates who register, whether or not they eventually appear on the ballot. Counties and municipalities may choose to track candidate filings here as well.

1. In the **Status-Reason** list box, the initial value will default to **Pending – Filing Period Open**.
2. The **Incomplete Filing** and **Comments** fields may be used as appropriate.
3. If you set up the **Office Type** to show items under the **Filing Checklist**, you will see items such as **Campaign Registration Statement**, **Declaration of Candidacy**, **Nomination Papers**, and **Statement of Economic Interests**. You will also see a **Deadline** date associated with each item, and a **Req?** checkbox indicating if the item is required.

**Filing Checklist**

Drag a column header here to group by that column

	Description	Deadline	Completed	Amended...	Req?	Changed...	Changed...
<input checked="" type="checkbox"/>	Campaign Registration Statement	7/13/2010	6/1/2010	6/3/2010	<input checked="" type="checkbox"/>	harvea	6/3/2010
<input checked="" type="checkbox"/>	Declaration of Candidacy	7/13/2010	6/1/2010	6/3/2010	<input checked="" type="checkbox"/>	harvea	6/3/2010
<input checked="" type="checkbox"/>	Nomination Papers	7/13/2010	6/1/2010		<input checked="" type="checkbox"/>	harvea	6/3/2010
<input type="checkbox"/>	Statement of Economic Interests	7/16/2010			<input checked="" type="checkbox"/>		

- a. Please note when you set up your **Filing Checklist** items in the **Office Type** record, you must enter the **Description** exactly as shown in order to make the associated reports work.
  - b. You must update the filing deadlines in the **Office Type** record every election cycle.
  - c. You must check the checkbox at the far left of the item to save changes. The **Completed**, **Changed by User**, and **Changed Date** fields will update automatically. You can manually update the **Completed** or **Amended** columns.
4. Under the Nomination Papers section, the number of signatures entered in the Office Type record will appear in the Required field.

- a. You will first select the **Nomination Status** of **Submitted**.
- b. Fill in the approximate number of signatures and pages.
- c. Type in the person who submitted the petitions under **Submitted By** and your own name under **Staff Responsible**.
- d. You should not enter a **Filing Receipt No.** That will be automatically generated by SVRS based on the election and the order in which the filing is received.

- e. If the candidate turns in supplemental signatures, check the **Supplemental** checkbox and select a date in the **Suppl Submitted Date**.

5. To print the **WI Nomination Paper Receipt**:

- Click the **Quick Tasks** button at the top of the form and select **Send Mailing** from the **Quick Tasks** panel.
- In the **Mailings** drop-down, select **WI Nomination Paper Receipt**.
- Click **Next**.
- You do not need to filter or sort this mailing.
- Check the **Printer Settings** and make sure that the document will be sent to the right printer.
- Select the **Print Now** button and click **OK**.
- A dialog box will appear asking "Did the mailing print successfully?" Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Receipt** was printed.

Step 1 of 2    Next

OK

Yes    No

- A sample of the report is shown to the right.

**Wisconsin Government Accountability Board**  
Nomination Paper Receipt

---

Nomination Paper Receipt No.: 2010GENEL-5

Wisconsin Government Accountability Board  
212 E WASHINGTON AVE  
P.O. BOX 7984  
MADISON, WI 53707-7984  
(608) 267-8005

---

Candidate ID #: \_\_\_\_\_  
Candidate Name : ALLISON COAKLEY  
Address 1 : 1308 MATHYS RD  
Address 2 : \_\_\_\_\_  
City, State, Zip : Monona, WI 53716  
Phone : \_\_\_\_\_

Election Date : 07/05/2010      Type : Special Election  
Office : ADAMS COUNTY CIRCUIT COURT JUDGE  
Party : Non-Partisan

Date Filed Campaign Registration Statement : June 3rd, 2010  
Date Filed Declaration of Candidacy : June 3rd, 2010  
Date Filed Nomination Papers : June 3rd, 2010  
Approximate Number of Pages : 40  
Approximate Number of Signatures : 400

Receptionist : \_\_\_\_\_

Agency Staff : \_\_\_\_\_



6. To print the **WI Nomination Paper Sufficiency**:

- Click the **Quick Tasks** button at the top of the **Candidate Filings** form and select **Send Mailings**.
- In the Mailings dropdown, select **WI Nomination Paper Sufficiency**.
- Click **Next**.
- This mailing does not need to be filtered or sorted.
- Check the **Printer Settings** and make sure that the document will be sent to the right printer.
- Select the **Print Now** button and click **OK**.

Step 1 of 2    Next

OK

- A dialog box will appear asking “**Did the mailing print successfully?**” Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Sufficiency** was printed.
- A sample of the report is shown to the right. You will attach this report to the petitions and use it to track several things, including the number of valid signatures, and if the number of signatures is insufficient.
- Save and Close** the **Candidate Filing** form. You will return to it when the number of signatures have been verified.

Wisconsin Government Accountability Board  
Nomination Paper Sufficiency Form

Receipt No.: 2010GENEL-5  
Candidate ID #: \_\_\_\_\_  
Candidate Name: ALLISON COAKLEY  
Address 1: 1308 Mathys Rd  
Address 2: \_\_\_\_\_  
City, State, Zip: Monona, WI 53716  
Phone: \_\_\_\_\_

Election Date: 07/05/2010    Type: Special Election  
Office: ADAMS COUNTY CIRCUIT COURT JUDGE  
Party: Non-Partisan

Date Filed Campaign Registration Statement: June 3rd, 2010  
Date Filed Declaration of Candidacy: June 3rd, 2010  
Date Filed Nomination Papers: June 3rd, 2010  
Approximate Number of Pages: 40  
Approximate Number of Signatures: 400

Papers Received from: ☐ Candidate  
☐ Mail  
☐ Other: \_\_\_\_\_ Phone: \_\_\_\_\_

Receptionist: \_\_\_\_\_  
WECF: \_\_\_\_\_ DOC: \_\_\_\_\_ Ethics: \_\_\_\_\_  
Agency Staff: \_\_\_\_\_  
Sufficiency Determined by: \_\_\_\_\_  
Number of Valid Signatures: \_\_\_\_\_

If number of signatures is insufficient, indicate problem below:

Date Candidate Contacted: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Contacted by: \_\_\_\_\_  
Date of Final Approval: \_\_\_\_/\_\_\_\_/\_\_\_\_  
Signature of Election Specialist: \_\_\_\_\_

EB-351 (Rev. 1/98)

7. When the number of signatures has been verified, you will reopen the **Candidate Filing** record and change the **Nomination Status** to **Sufficient**. (In some cases you may choose **Insufficient** or **Sufficient with Supplemental**).
8. Enter the number of verified signatures in the **Valid** field.
9. Make sure that the candidate has met all the requirements in the filing checklist before you change the **Status Reason** to **Approved – Approved**,

**Nomination Paper**

Nomination Status: **Sufficient**

No. of Signature: Required: 200 Valid: **382**

Approximate: 400

Approx. Pages: 40

Submitted By: ERIC LEARN

Staff Responsible: DIANE LOWE

Filing Receipt No: 2010GENEL-5

☐ Supplemental

Suppl. Submitted Date:

10. To print the **WI Nomination Paper Verification**:

- a. Click the **Quick Tasks** button at the top of the **Candidate Filings** form and select **Send Mailings**.
- b. In the Mailings dropdown, select **WI Nomination Paper Sufficiency**.
- c. Click **Next**.
- d. This mailing does not need to be filtered or sorted.
- e. Check the **Printer Settings** and make sure that the document will be sent to the right printer.
- f. Select the **Print Now** button and click **OK**.
- g. A dialog box will appear asking “**Did the mailing print successfully?**” Click **Yes**. There will now be a record on the **Activity Tab** of the **Candidate Filing** record that the **WI Nomination Paper Verification** was printed.

**Create Mailing**

Select Mailing

Category: Candidate Filing

Mailings: WI Nomination Paper Verific...

Candidate Lbls  
Candidate Lbls with Barcode  
WI Candidate Mailing Label  
WI Candidate Mailing Labels 2X10  
WI Nomination Paper Receipt  
WI Nomination Paper Sufficiency  
WI Nomination Paper Verification

Step 1 of 2

Next

**Create Mailing**

Selected Mailing

WI Nomination Paper Verification

Mailing Options

Filter: (Selected Record...)

Sort By: (Select Sort)

Messages: (Select Message)

More Mailing Options

☐ Schedule Mailing

(Select Sch...)

☐ Auto Confirm Print?

Print Options

Printer Settings

☐ Preview  
☒ Print Now  
☐ Queue for Later Printing

OK



After you have printed all three types of Candidate Nomination Paper verification forms, you can go to the Activity Tab of the Candidate Filing record and verify that they were all printed. If you highlight one of the lines in the upper grid, you will see more information in the lower grid.

**Candidate Filing - Update - Filing #70047066**

Save and Close Save and New Close Quick Tasks Set Defaults Use Defaults

Candidate Filing Other Activity Documents

Refresh

Activity

Drag a column header here to group by that column

Activity	Jurisdiction	Updated On	Updated By	Created On	Created By
Mailing		2 6/12/2010	harvea	6/12/2010	harvea
Mailing		2 6/12/2010	harvea	6/12/2010	harvea
Mailing		2 6/12/2010	harvea	6/12/2010	harvea

Details

Mailing Type	Queued On	Printed On	Returned On	Response
WI Nomination Paper Sufficiency	6/12/2010	6/12/2010		

- h. A sample of the report is shown to the right. You will sign this document and transmit it to the candidate.
- i. Make sure that the candidate has met all the requirements in the filing checklist before you change the **Status Reason to Approved – Approved,**
- j. **Save and Close the Candidate Filing form.**

<p>Wisconsin Government Accountability Board Nathaniel E Robinson, Elections Division, Administrator 212 E WASHINGTON AVE P.O. BOX 7984 MADISON, WI 53707-7984 (608) 267-8005</p>	
<p>Candidate ID # : ALLISON COAKLEY 1308 MATHYS RD MONONA, WI 53716</p>	
<p>This is to acknowledge receipt for the nomination papers of <b>ALLISON COAKLEY</b> FOR THE OFFICE OF ADAMS COUNTY CIRCUIT COURT JUDGE</p> <p>Special Election to be held July 5th, 2010</p>	
<p>Party Affiliation: Non-Partisan</p> <p>Nomination Papers filed June 3rd, 2010</p> <p>Declaration of Candidacy filed June 3rd, 2010</p> <p>Application for Public Funding filed (Not Filed)</p> <p>Statement of Economic Interest filed (Not Filed)</p> <p>Number of Valid Signatures: 382</p>	
<p>This is number of valid signatures determined by the Government Accountability Board staff. This number is subject to challenge within 3 business days following the deadline for filing nomination papers.</p>	
Verified By _____	Date: May 12th, 2010
EB-152 (Rev. 5/2010)	Nomination Paper Receipt No.: 2010GENEL-5



## Search for and Update a Candidate Filing



You can search for and update a candidate filing. Perhaps you noticed a name misspelling and need to correct the spelling.

1. Expand (+) the **Elections** node.
2. Expand (+) the current election.
3. Click the **Candidate Filings** node.
4. On the search pane, enter search criteria and click **Search**.
5. In the data grid, double-click on the row for the candidate record you wish to update.
6. Make changes to the **CandidateFiling** record.
7. Click the **Save and Close** button.



Remember that once you have checked Milestone #3, you will be unable to change **Contests** and **Candidates** for that election. You must uncheck Milestone #3, make any changes, and recheck the milestone. If you are a county level user, and you need to change a contest or candidate, every municipality in your county must uncheck Milestone #3 before you can uncheck it at the county level.

The screenshot displays two windows from the software. The top window, titled 'AI - M', shows a search interface for 'STATE OF WISCONSIN'. It includes fields for 'Last Name' (Hansen), 'First Name' (Barbara), 'Party' (Non-Partisan), and 'Election' (2008 SPRING ELECTION). A 'Search' button is visible. Below the search fields is a data grid with columns: 'Candidate Name', 'Contest Description', 'Party', 'Filed On', 'Filing Status Code', and 'Filing Status'. One row is highlighted: 'HANSEN, BARBARA JEAN', 'JUSTICE OF THE SUPRE', 'Non-Partisan', '11/8/2007', 'Approved', and 'Approved'. The bottom window, titled 'CandidateFiling - Update - Filing #70016539', shows the 'Update' form for the selected candidate. It contains various fields for 'Candidate Detail' (Candidate Name, Election, Contest, Party, Ballot Position, WSEB ID#), 'Filing Detail' (Status-Reason, Filed On, Date Status Changed, Fee or Petition, Filing Receipt No, Election Results), and 'Petition Details' (Nom. Papers, Nom. Paper Status, Pet. Status Chg, Notices). The 'Save and Close' button is at the top of this window.